



# Private Funds CFO Network

**Where successful CFOs, COOs and  
CCOs connect, learn and grow**

The Private Funds CFO Network is the exclusive hub for the most influential finance, operations and compliance executives working in private markets. The Network is rich in communal knowledge and provides exclusive introductions, intimate peer gatherings around specific topics, and continuing professional education opportunities.

**Join a packed half-day event of guided discussion and connections: get actionable insights on AI & automation, while strengthening your network with industry peers.**

*Up to 3 CPE credits available*

## **Boston**

June 18; 2:00PM- 6:00 PM  
View Boston, 800 Boylston Street  
50<sup>th</sup> Floor

## **Chicago**

June 25; 2:00PM-5:30 PM  
110 North Wacker Drive  
3<sup>rd</sup> Floor

## **Roundtable discussions**

The roundtable format of this event consists of three 50-minute small group conversations. The facilitators of each topic will rotate tables so that each table discusses each one of the below topic areas.

Network Director  
**Chris Tamms**  
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For Sponsorship  
opportunities:  
**Joshua Stoller**  
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To join the Network:  
**Anna Dorokhin**  
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[privatefundscfo.com/packages/](https://privatefundscfo.com/packages/)

**PEI**

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## Topic Areas

### **Automating the Finance Function: From Back Office to Strategic Partner**

- Optimizing financial reporting, forecasting, and compliance with automation and/or AI.
- Streamlining fund operations and improving efficiency.
- Automation and/or AI tools for risk management and fraud detection.

### **AI & Automation for Portfolio Insights and Performance Monitoring**

- AI-driven portfolio monitoring and performance benchmarking.
- Streamlining valuation and reporting processes.
- The role of automation in LP reporting and transparency

### **Future-Proofing Finance Teams: AI Talent & Tech Integration**

- Building an AI-literate finance team.
- Selecting the right AI tools and implementation strategies.
- Overcoming adoption challenges and demonstrating ROI.

## Agenda

**2:00 – 2:30 PM | Registration & Welcome**

**2:30 – 3:20 PM | First Discussion**

**3:20 – 4:10 PM | Second Discussion**

**4:10 – 5:00 PM | Third Discussion**

**5:00 – 6:00 PM | Networking Drinks (Boston)**

**5:00 – 5:30 PM | Networking Drinks (Chicago)**

*\*Up to three CPE credits will be available for the category of Information Technology*

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